

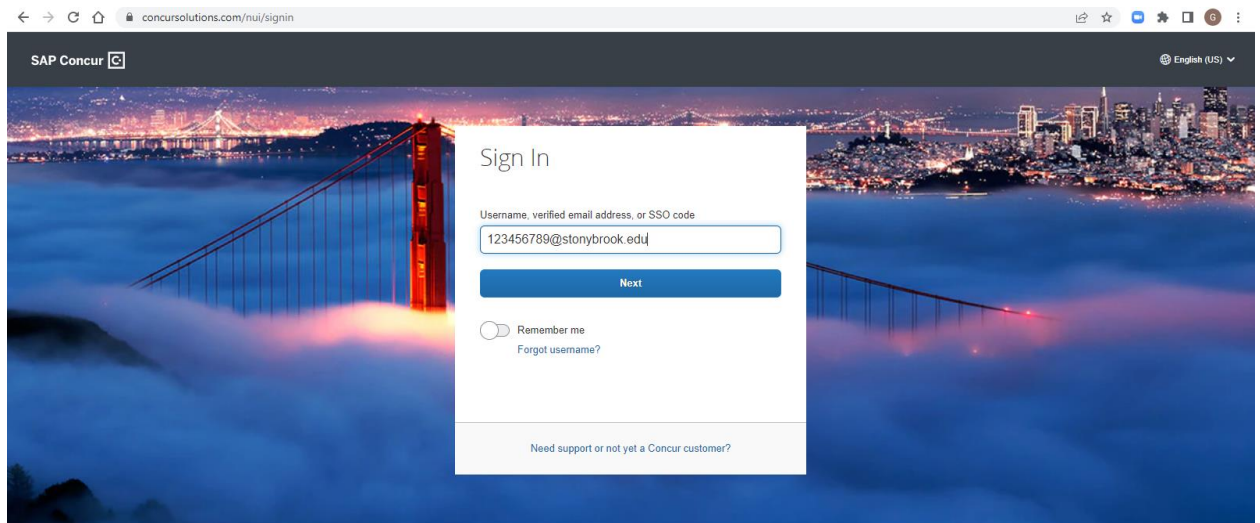
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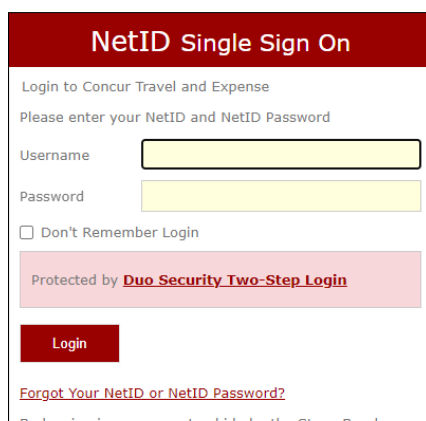
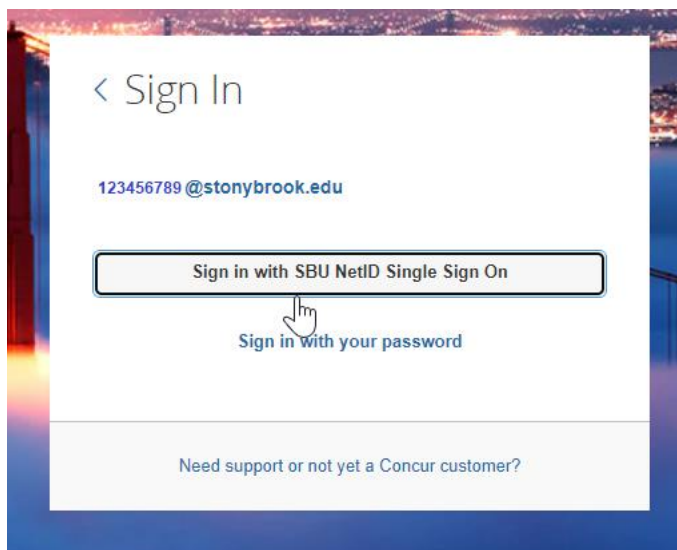
I. Log on to Concur

Using a web browser, go to the following website: <https://www.concursolutions.com>

Enter your username as your 9-digit Stony Brook ID Number followed by @stonybrook.edu (for example: 123456789@stonybrook.edu).

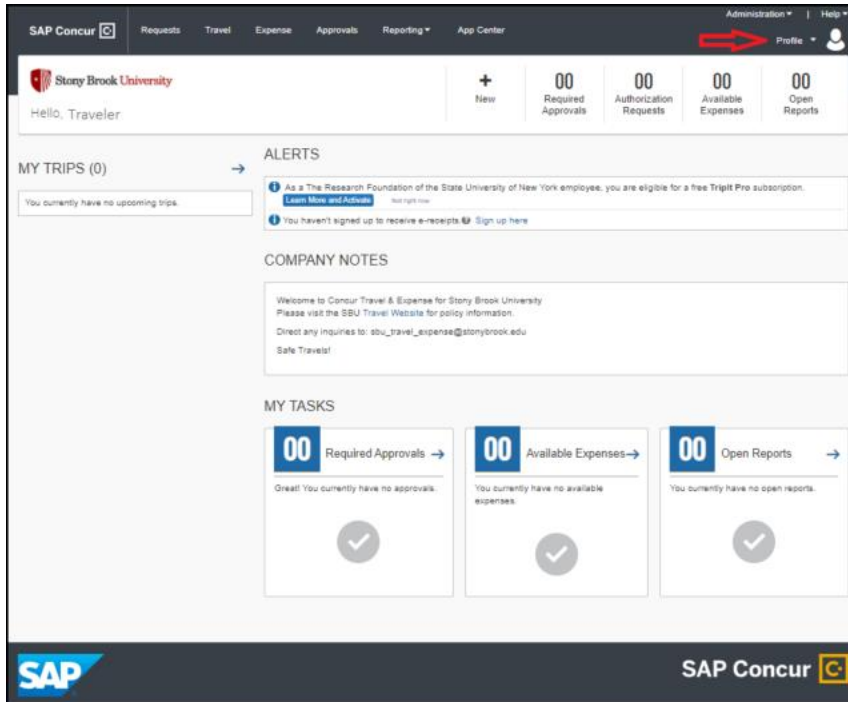


Click on *Sign in with SBU NetID Single Sign On*



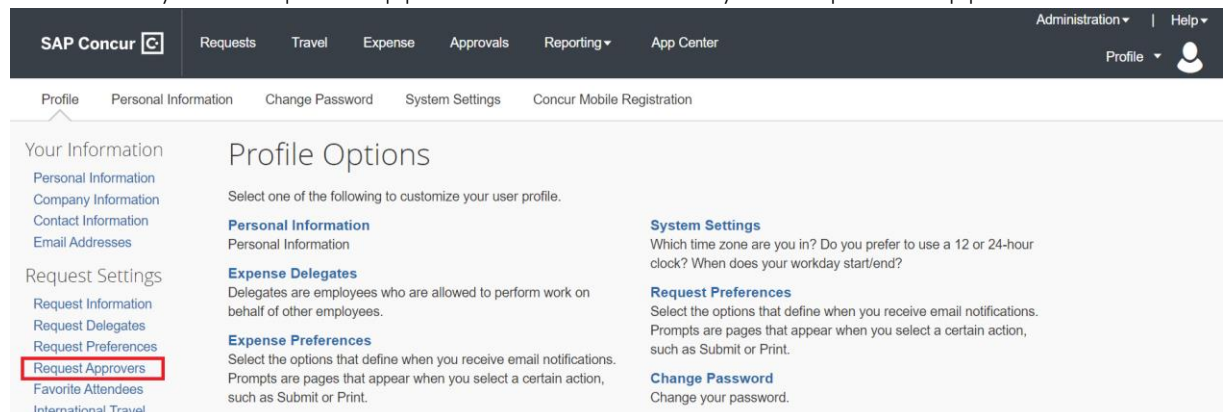
II. Confirm Your Profile Settings

Once you have [logged](#) onto [Concur](#). Click on Profile at the top right side of your screen to confirm your settings.



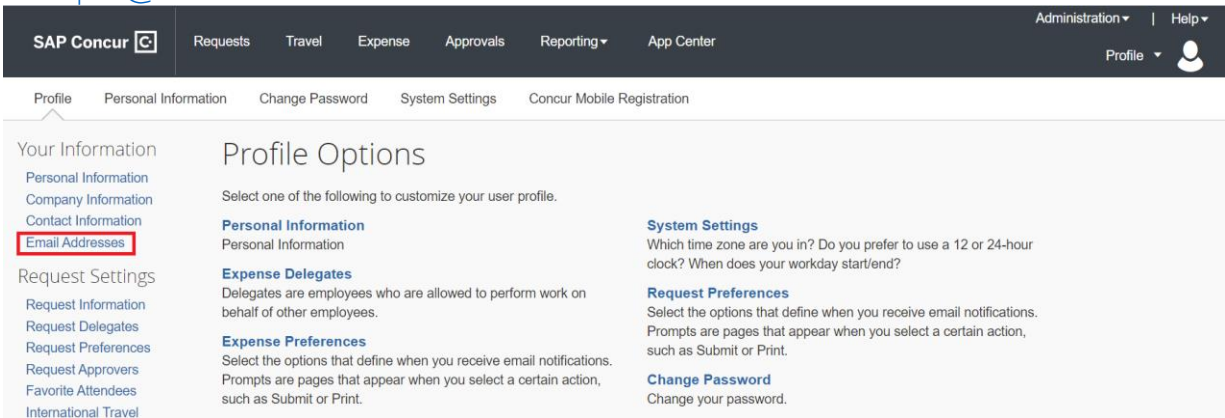
1. Please **verify** that your Supervisor on record is correct. This information is sourced through PeopleSoft; therefore, if the name is incorrect your correct Supervisor will need to consult with your VP Coordinator who will resolve the matter with HR.

Note that your Request Approver is the same as your Expense Approver.



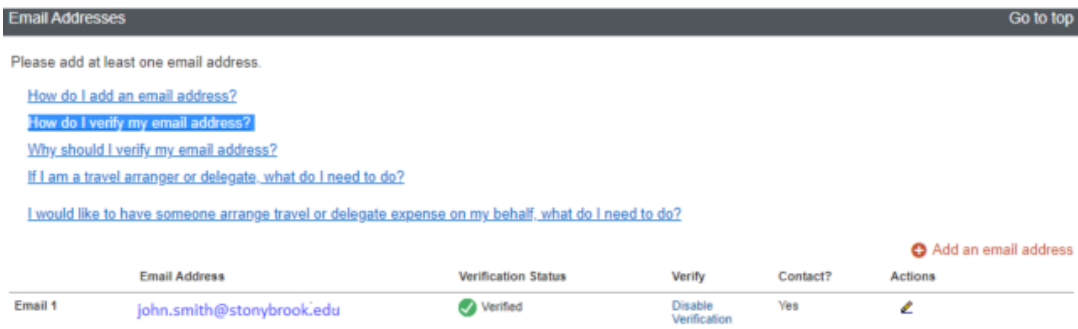


2. Please **verify** your email address to be able to forward receipts to receipts@concur.com.



[How do I verify my email address?](#)

1. Once you've added an email address, select **Verify**.
2. You will be sent a verification email. Locate the code included in the email.
3. In your SAP Concur solution, enter the code into the Enter Code field next to the email address you're verifying.
4. Click **OK** to complete verification.



3. If you use an alternate work email address, please be sure to **add** and **verify** that address to your profile.

[How do I add an email address?](#)

1. Select **Add an email address** below.
2. Enter your email address.

3. Select **Yes** to have SAP Concur travel notifications sent to that email account.
4. Click **OK** to save.

Email Addresses Go to top

Please add at least one email address.

[How do I add an email address?](#)
[How do I verify my email address?](#)
[Why should I verify my email address?](#)
[Travel Arrangers / Delegates](#)

+ Add an email address

	Email Address	Verify	Contact?	Actions
Email 1	john.smith@stonybrook.edu	<input checked="" type="checkbox"/> Not Verified	Yes	Verify ✎

Enter email address

Contact for Travel Notifications? Yes No

[OK](#) [Cancel](#)

III. View your Unsubmitted P-Card Report

Click on the *Expense* tab on the black menu bar

SAP Concur Requests Expense Approvals Reporting App Center Administration | Help

Profile

+
Start a Request

+
Start a Report

+
Upload Receipts

00
Authorization Requests

00
Available Expenses

02
Open Reports

COMPANY NOTES

Welcome to Concur Travel & Expense for Stony Brook University
 Please visit the [SBU Travel Website](#) for policy information.
 Direct any inquiries to: sbu_travel_expense@stonybrook.edu
 Safe Travels!

TASKS

00 Open Requests

User currently has no active requests.

00 Available Expenses →

User currently has no available expenses.

02 Open Reports →

05/07 P-CARD STMT 2022 05/07 - 06/06
\$690.85

Click on the Purchasing Card Statement Report to open it

The screenshot shows the SAP Concur Expense Management interface. At the top, there is a navigation bar with 'SAP Concur' logo and tabs for 'Requests', 'Expense' (selected), 'Approvals', and 'App Center'. Below this, there are links for 'Manage Expenses' and 'View Transactions'. The main heading is 'Manage Expenses' with a 'REPORT LIBRARY' section. A dropdown menu shows 'View: Active Reports'. There are two main cards: one for 'Create New Report' and another for a report titled 'P-CARD STMT 2022 05/07 - 06/06' with a total amount of '\$690.85'. The report card is highlighted with a blue border and a hand cursor. Below the report card, there is a summary bar with the report title and amount, a 'Submit Report' button, and the status 'Not Submitted'. Underneath, there are options for 'Report Details', 'Print/Share', and 'Manage Receipts'. A table of expenses is displayed with columns for Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. Two rows are visible, both for 'State P-Card' transactions, one from NUSIL TECHNOLOGY LLC and one from THE HOME DEPOT #1265.

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		State P-Card	Undefined	NUSIL TECHNOLOGY LLC	05/25/2022	\$620.89
<input type="checkbox"/>		State P-Card	Undefined	THE HOME DEPOT #1265	05/20/2022	\$69.96
						\$690.85

A statement report will be automatically created for each month that you made a credit card transaction. Each statement report will only contain the transactions posted within the dates shown in the title of the report.

If transactions are missing, please make sure you give the system a few days to receive this information from the credit card company. Otherwise, contact the Travel and Card Program Office if transactions are missing.

IV. Attach Required Receipts

Click on each credit card transaction to view its details.

Click on the *Receipt* tab to upload an image of your receipt/invoice.

Please be advised that you can email receipts to your account by email forwarding receipts to receipts@concur.com or using the Concur mobile app.

05/20/2022 | THE HOME DEPOT #1265 | Corporate Card

Details | Itemizations | Hide Receipt

* Required field

Expense Type *
Undefined

Transaction Date: 05/20/2022 | Posted Date: 2022-05-23

MCC: 5200 | Enter Vendor Name: THE HOME DEPOT #1265

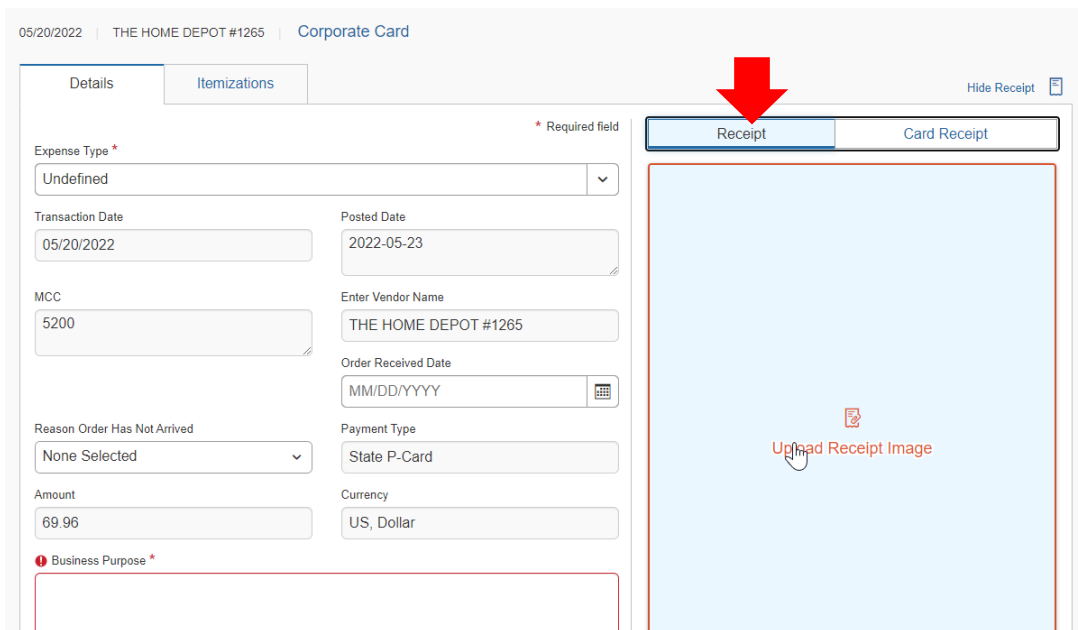
Reason Order Has Not Arrived: None Selected | Order Received Date: MM/DD/YYYY

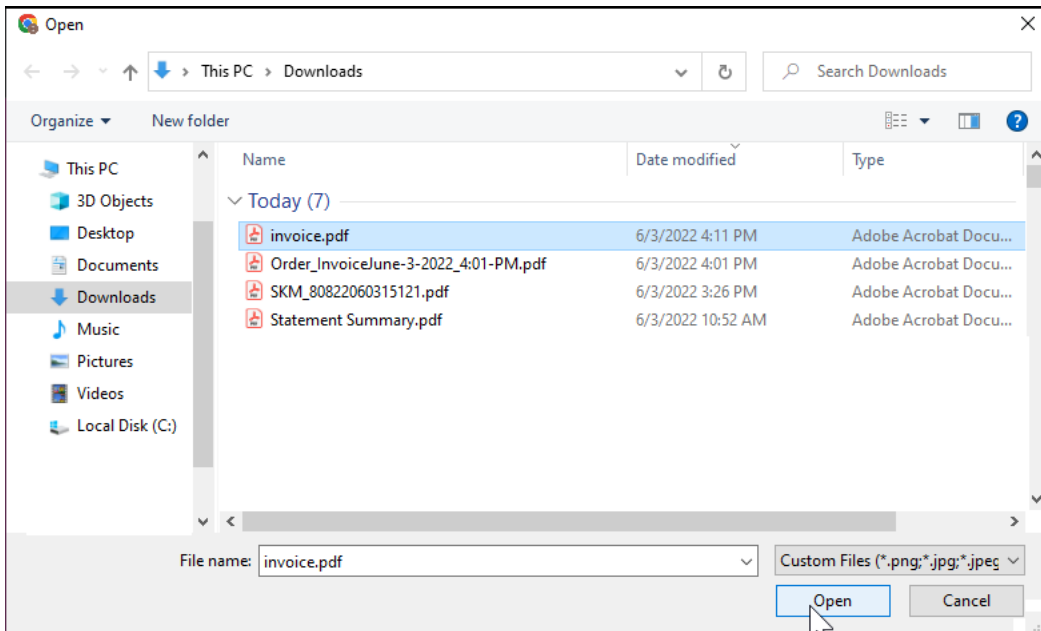
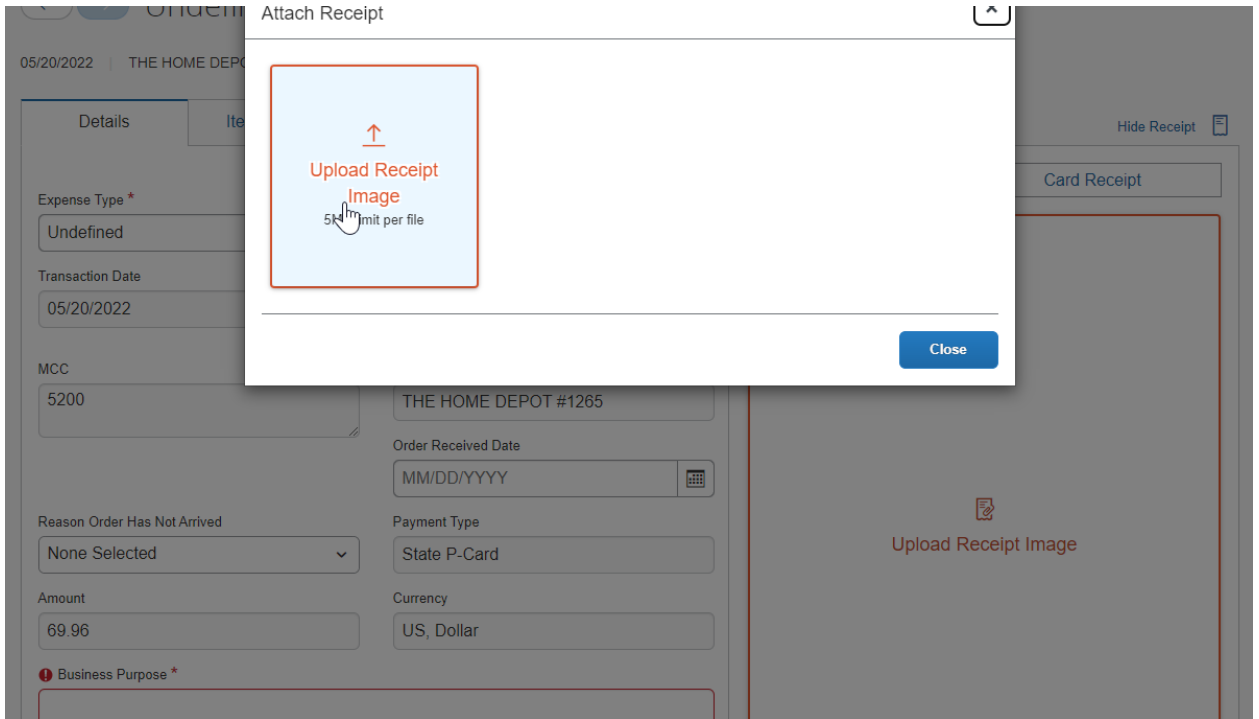
Payment Type: State P-Card | Amount: 69.96 | Currency: US, Dollar

Business Purpose *

Receipt | Card Receipt

Upload Receipt Image





V. Provide Required Purchase Information

1. Use the drop-down menu to select the appropriate Expense Type

05/20/2022 | THE HOME DEPOT #1265 | Corporate Card

Details | Itemizations

Expense Type *

Undefined

Fraudulent Transaction

Hospital Event

Office Supplies

Other

Patient Event/Supplies

Professional Membership

MM/DD/YYYY

Reason Order Has Not Arrived

None Selected

Payment Type

State P-Card

Amount

69.96

Currency

US, Dollar

Business Purpose *

Hide Receipt

Receipt | Card Receipt

1 / 1

SPECIAL SERVICES CUSTOMER INVOICE

Home Depot SOUTH METAJET Phone: 878-286-7668
SOUTH METAJET SOUTH METAJET, NY 11702 Salesperson: CAROLIZ Romero: 5688

Page 1 of 1 No. H1265-212722

REPRINT

Customer Information

Print/Pay/Order: 878-633-6817

Card: 103 886 0066

Shop/Store: South Metajet University

City: NY

State: NY

Zip: 11702

Invoice Date: 2022-04-01 16:05

CUSTOMER PICKUP #1 MERCHANDISE AND SERVICE SUMMARY

ITEM #	DESCRIPTION	QUANTITY	UNIT PRICE	EXTENSION
103 886 0066	2.00L 16.9X16.5 GALLOON TOUGH TOOL	1	69.96	69.96
MERCHANDISE PICKUP LABEL: 8842999				0.00
END OF CUSTOMER PICKUP LABEL				0.00

TOTAL CHARGES OF ALL MERCHANDISE & SERVICES

Category	Amount
Printed in US	0.00
A RECIPT'S DEFAULT POLICY	0.00
TOTAL	69.96
EXHIBIT 101	0.00

FOR BILL CALL: MERCHANDISE PICKUP PROCESSED TO BILL CALL ONLY

2. Enter the Order Received Date

If your order does not arrive before your submitted certification packet is due, please use the dropdown menu to select the reason your order has not arrived (and be sure to follow up with the vendor accordingly).

Details **Itemizations** Hide Receipt

Expense Type * * Required field
Office Supplies

Transaction Date: 05/20/2022 Posted Date: 2022-05-23

MCC: 5200 Enter Vendor Name: THE HOME DEPOT #1265

Reason Order Has Not Arrived: None Selected

Amount: 69.96

Business Purpose *

Order Received Date: MM/DD/YYYY

< May 2022 >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

Receipt **Card Receipt**

Details **Itemizations**

Expense Type * * Required field
Office Supplies

Transaction Date: 05/20/2022 Posted Date: 2022-05-23

MCC: 5200 Enter Vendor Name: THE HOME DEPOT #1265

Reason Order Has Not Arrived: None Selected

Payment Type: State P-Card

Currency: US, Dollar

Business Purpose *

None Selected

Backorder (will follow up)

Cancelled Order (will follow up)

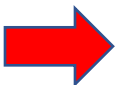
Fraudulent Transaction (Disputed Transaction)

Lost (will follow up)

3. Provide the Business Purpose

Fill in your Business Purpose for the transaction (*why* you purchased the item(s), not what you purchased) and then click Save Expense.

Note that you can upload additional supporting documents to the Receipts area (such as written approvals or lists of attendees) by clicking the Append button.



Office Supplies

Transaction Date: 05/20/2022 Posted Date: 2022-05-23

MCC: 5200 Enter Vendor Name: THE HOME DEPOT #1265

Reason Order Has Not Arrived: None Selected Payment Type: State P-Card

Amount: 69.96 Currency: US, Dollar

Business Purpose *
Bin used to store extra supplies for ER Exam Room 5A.

Save Expense Cancel

1 / 1

SPECIAL SERVICES CUSTOMER INVOICE Page 1 of 1 No. H1265-212722

DEPARTMENT: SOUTH BETHLEHEM, PA 18015 PHONE: 610-391-3800 SALESREP: CAROL RECEIVER: 4016

ORDER # 102 ORDER DATE: 05/20/2022 ORDER TIME: 10:17:00

CUSTOMER PICKUP #1 **MERCHANDISE AND SERVICE SUMMARY**

ITEM #	QTY	UNIT	DESCRIPTION	PRICE	EXTENSION
1	1	EA	100% COTTON T-SHIRT	100.00	100.00
2	1	EA	100% COTTON T-SHIRT	100.00	100.00
3	1	EA	100% COTTON T-SHIRT	100.00	100.00

TOTAL CHARGES OF ALL MERCHANDISE & SERVICES

DESCRIPTION	AMOUNT
ORDER TOTAL	300.00
TAXES	30.00
TOTAL	330.00
BALANCE DUE	330.00

FOR WILL CALL MERCHANDISE PICK-UP PROCEED TO WILL CALL OR

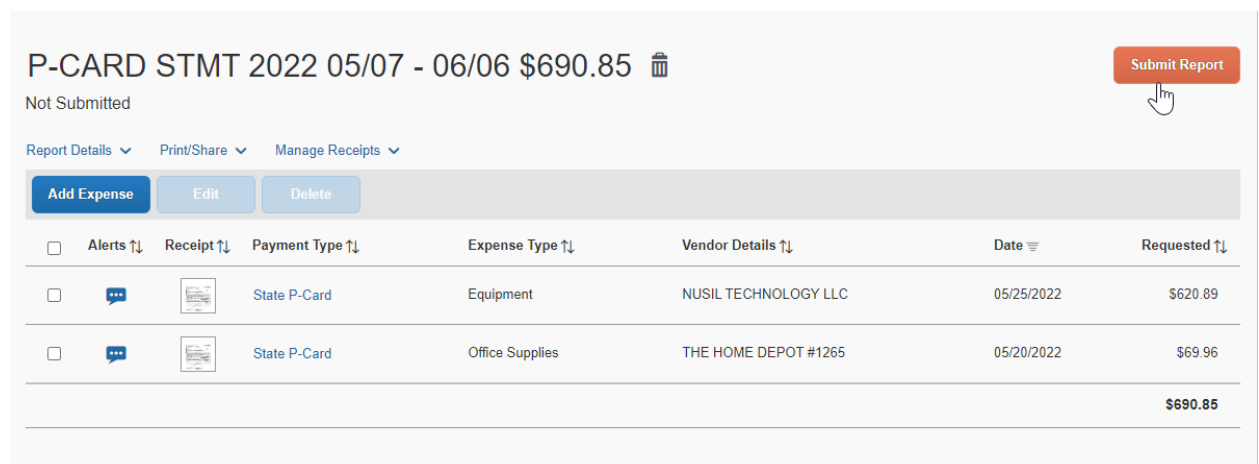
invoice.pdf Detach **Append**

VI. Submit your P-Card Statement Report

Checklist before submitting a report

1. The SBU Travel and Card Program Office will remind you of the deadline for submitting your completed monthly P-Card Statement reports.
2. Confirm that all required information and receipts for each of your transactions have been completed.
3. Certify on the SUNY Certification System

You may then click on the *Submit Report* button.



The screenshot displays a web interface for a P-Card Statement Report. At the top, the report title is "P-CARD STMT 2022 05/07 - 06/06 \$690.85" with a trash icon. Below the title, it says "Not Submitted". On the right side, there is a red "Submit Report" button with a hand cursor icon pointing to it. Below the title, there are three dropdown menus: "Report Details", "Print/Share", and "Manage Receipts". Underneath these are three buttons: "Add Expense" (dark blue), "Edit" (light blue), and "Delete" (light blue). The main part of the interface is a table with the following columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains two rows of transaction data and a total row at the bottom.

<input type="checkbox"/>	Alerts ↑↓	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ≡	Requested ↑↓
<input type="checkbox"/>			State P-Card	Equipment	NUSIL TECHNOLOGY LLC	05/25/2022	\$620.89
<input type="checkbox"/>			State P-Card	Office Supplies	THE HOME DEPOT #1265	05/20/2022	\$69.96
							\$690.85

After you accept the P-Card Electronic Agreement by clicking on the *Accept & Continue* button, your supervisor (sourced through the HR system) will receive an email notifying them that their approval is required.

*P-Card-User Electronic Agreement


As the State P-Cardholder, I certify that the purchases and amounts listed on this account statement are correct and required to fulfill the mission of my Campus, do not exceed spending limits approved by the Program Administrator, are not for my personal use and are not for items prohibited by statute or by my Campus.

Cancel




Accept & Continue






VII. Monitor the Approval Process

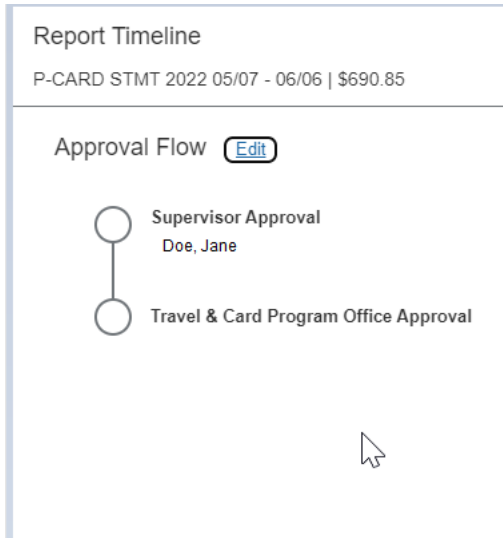
To monitor the approval process, you can click on *Report Details* and select *Report Timeline*.

P-CARD STMT 2022 05/07 - 06/06 \$690.85 

Not Submitted

Report Details  Print/Share  Manage Receipts 

Report	Edit	Delete	
Report Header			
Report Totals	Receipt 	Payment Type 	Expense Type 
Report Timeline	 State P-Card	Equipment	
Audit Trails			
Linked Add-ons			
Manage Requests	 State P-Card	Office Supplies	



VIII. Supervisor Approval

To approve, your Supervisor will log onto Concur and click on the *Approvals* tab.

Statement Reports

Report Name	Employee	Card Program Name	Statement Close Date	Requested Amount
P-Card Statement 05/07 - 06/06 Statement Report for Period 05/07 - 06/06	PCardholder, Peter	P-Card	06/06/2022	\$690.85